**How to choose a digital system**

Choosing a digital solution that best fits your third sector organisation’s needs now while thinking about the months and years to come is important.

We’ve created a checklist to get you started, you can use it when you’re thinking about using and buying a digital system.

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| **Step 1 - Understanding your goals** |
| What goals do your third sector organisations want to use this system to meet? |

Tick which goals you want to use a digital system to help you and your team. There are four sections that are Fundraising, Projects, Team and Communication.

This list is just a start. You may have goals that aren’t listed below, we’ve left a box at the end of each list you can write them in.

**Fundraising/Donations**

* Pledges and donations
* Investments, Grants and other sums
* Membership dues
* Case Management
* Grant Management
* Payment options like Paypal, Google Pay, Apple Pay

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| Add your goal here… |

**Projects/Campaigns**

* Project and task tracking
* Growing social media following
* Increasing your email campaign list
* Reporting your social media or email campaigns
* Reporting financial progress

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| Add your goal here… |

**Team**

* Volunteer time management
* Team time management
* Adding volunteers and staff to your current volunteer team
* Team and volunteer satisfaction
* Upskilling your team and volunteers on digital systems

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| Add your goal here… |

**Communication**

* Special events - Donor appreciation, Galas, online or in person auctions, silent auctions,
* Receiving feedback from your audience, volunteers and team to use your choice of digital systems in a better way.
* Understanding different sections of your audience and what the topics, themes and activities you run that they like the best.
* Picking out which social media channels are working the best.
* Know when your audience will be using social media and checking their emails.
* Share your third sector organisations message on an ongoing basis.

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| Add your goal here… |

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| **Step 2 - Digital System Awareness** |
| How many digital systems do you know already and can they support your third sector organisation meet its goals? |

These 6 areas are helpful starting considerations when you are beginning your digital system consideration. As you research digital systems you will be able to see whether or not they can support your needs and goals.

With that in mind, to get you started, in each box below write down some of the systems you have heard of, people have mentioned or recommended to you or you have used that claim they are for the third sector.

The digital systems you add below can be the first list of digital systems you research.

* *Don’t worry if you can’t name all 5 that’s ok, this is just a chance to think about and sort the digital systems you’ve heard of in one place.*

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| **Help Third Sector Organisations**  *some websites say they offer help but when you look deeper there are only free trials and no discounts.*  1.  2.  3.  4.  5. |

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| **Reporting on Projects, Campaigns and Fundraising**  *checking that the analytics of your campaigns, fundraising, and donor profiles can be reported on based on your team’s needs.*  1.  2.  3.  4.  5. |

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| **Remote Collaboration**  *your team and volunteers may be working remotely, can they access the solution from anywhere and at any time, on any device?*  1.  2.  3.  4.  5. |

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| **Tools for growth**  *can this system connect with other systems that you may need for future campaigns?*  1.  2.  3.  4.  5. |

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| **Automation**  *Does the system make it easier to complete time-consuming documentation quickly?*  1.  2.  3.  4.  5. |

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| **Compliance and Data protection**  *Is your information being carefully looked after? Who provides the protection and security of the information? Do they use another system, if so which one?*  1.  2.  3.  4.  5. |

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| **Step 3 - Cost considerations** |
| What things should you question thoroughly when you are considering a digital system? |

We’ve put together some key considerations that can affect the cost of a digital system and also the number of people who can use it.

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| **Subscription Plan** | Subscription plans offer a system for a fixed cost each month. |
| **UsersE** | Each subscription plan comes with a set amount of users for the fixed price you page each month. There are free trials where you can have 3 users, and for example you can have 3-5 users on a basic plan, 5-20 users on a regular plan and 20+ users on an advanced plan. |
| **Devices** | Each subscription plan will tell you how many devices your system will work across for the fixed price each month. For example 1 device on a basic plan, 5 devices on a regular plan and 10 devices on an advance plan. |
| **Nonprofit account** | have you created a nonprofit account to meet the eligibility requirements for a discounted rate? |
| **Integrations** | there are some times when you will need additional technical help to connect your systems and the digital system can provide this at an additional cost. |

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| **Step 4 - Discount Links** |
| We’ve listed out the digital system type and the links to their discounts and offers for third sector organisations. |

This section contains a list of links to discounts or third sector-specific services offered by Digital Systems across business management, Accounting, HR (Human Resources), Security, Fundraising and Marketing and Communications and enterprise digital systems.

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| **Digital System** | **Third Sector organisation Link** |
| **Business management Systems** | [Google Workspace](https://www.google.com/intl/en-GB/nonprofits/)  [Microsoft Plans](https://www.microsoft.com/en-gb/microsoft-365/nonprofit)  [iWork (Apple)](https://www.apple.com/uk/iwork/)  [Zoho Enterprise](https://www.zoho.com/crm/non-profit/)  [Slack](https://slack.com/intl/en-gb/help/articles/204368833-Apply-for-the-Slack-for-Charities-discount)  [Dropbox](https://help.dropbox.com/accounts-billing/payments-billing/discounts) |
| **Accounting Systems** | [Xero](https://www.xero.com/uk/small-businesses/non-profit/)  [Quickbooks (Intuit)](https://quickbooks.intuit.com/industry/non-profits/)  [Sage People](https://www.sage.com/en-gb/industry/non-profit/) |
| **Human Resources (HR) Systems** | [Bright HR](https://www.brighthr.com/)  [Monday](https://monday.com/nonprofits)  [Mitrefinch](https://www.mitrefinch.co.uk/) |
| **Security systems** | [Bitdefender](https://www.bitdefender.co.uk/business/solutions/small-medium-business-cybersecurity.html)  [Norton](https://uk.norton.com/products/norton-360-standard?inid=nortoncom_nav_norton-360-standard_homepage:home)  [McAfee](https://www.mcafee.com/en-gb/index.html) |
| **Fundraising systems** | [Raiser’s Edge NXT (Blackbaud)](https://www.blackbaud.com/who-we-serve/nonprofit-organizations) - most suitable for mid-sized third sector organisations.  [Salesforce - See The Power of Us Programme](https://www.salesforce.com/uk/solutions/industries/nonprofit/overview/) |
| **Marketing & Communications Systems** | [Hubspot](https://www.hubspot.com/nonprofits)  [Mailchimp](https://mailchimp.com/en-gb/help/about-mailchimp-discounts/)  [Buffer](https://buffer.com/nonprofits) |
| **Enterprise Systems** | [Salesforce](https://www.salesforce.com/uk/products/#products-scroll-tab)  [Zoho](https://www.zoho.com/enterprise/)  [Hootsuite](https://www.hootsuite.com/plans/enterprise) |